



MARKET INTELLIGENCE · VERIDICA RESEARCH STREAM

Market & Gap Report

Market sizes, tailwinds, the white space, and a top-down TAM / SAM / SOM for the Iam Awesome ecosystem — with the underlying evidence for the "why now" narrative.

Big, fast-growing markets — pointed at our exact whitespace.

Iam Awesome sits at the convergence of social-emotional learning, kids' digital wellbeing, character licensing and children's publishing — none of which offers a single, values-driven, cross-format IP ecosystem that builds a child's positive identity and confidence rather than tutoring academics.

Market sizes & growth

Market	Size → forecast	Year	CAGR	Source
SEL — global	\$2.3B → \$27.7B	2022/33	26.2%	Grand View
SEL — global (conservative)	\$1.1B → \$5.2B	2022/29	24.5%	Fortune Bus. Insights
SEL — global (skeptic)	\$9.25B → \$10.15B	2025/30	1.9%	Mordor Intelligence
SEL — US	\$846.8M → \$3.43B	2023/30	22.1%	Grand View
K-12 edtech — global	\$78.2B → \$253.9B	2023/33	12.5%	Market.us
AI in education — global	\$8.3B → \$57.2B	2025/33	25.9%	Grand View
AI in K-12 education	\$390.8M → \$7.95B	2024/33	38.1%	Grand View
Mental-health apps — global	\$7.48B → \$17.52B	2024/30	14.6%	Grand View
Meditation/mindfulness apps	\$2.20B → \$6.99B	2025/33	14.7%	Grand View
Parenting/family apps	\$2.0B → \$5.5B	2023/33	12.2%	Market.us
Children's book publishing	\$15.9B → \$24.5B	2023/31	6.3%	Verified Mkt Research
Global licensing (retail)	\$369.6B	2024	+3.7% YoY	Licensing Int'l
Character/entertainment licensing	\$149.8B (40.5% share)	2024	~7–10%	Licensing Int'l
Kids & baby consumer products	\$355.9B → \$579.5B	2025/33	6.4%	Grand View
Trading cards	~\$13B	2024	8.5%	Market Decipher
Pokémon franchise (comparable)	~\$115B lifetime (~\$12B/yr)	2024/25	—	Wikipedia

SEL estimates vary 3x+ between research firms — we present the range (from Grand View's high-growth view to Mordor's near-flat dissent) and cite firm + year on every figure so the numbers survive scrutiny.

Australia context

- Australia edtech: **US\$3.9B (2024) → US\$7.4B by 2033 (7.3% CAGR)**; GlobalData reports ~US\$4.1B in 2024, +13.5% YoY.
- ~2.0–2.2M children aged 6–12** (est. from ABS Jun-2024); ~2.75M families with children 0–14.
- ~14% of children 4–11 (~314,000) had a mental disorder in the prior year; anxiety the 2nd most common (6.9%) — AIHW / Young Minds Matter (2013–14, dated but authoritative).

- Households with a school-age youngest child spent ~\$152/week (~\$7,900/yr) on school fees (ABS HES 2015–16); education the fastest-growing spend category.
- **>90% of Australian parents** rank excessive screen time their #1 child-health concern (RCH National Child Health Poll).
- **Under-16 social-media ban** in force since 10 Dec 2025, penalties to ~A\$49.5M — clearing mainstream platforms from IAM's 6–12 band.

Demand drivers / tailwinds

1. **Youth mental-health crisis.** WHO: 1 in 7 aged 10–19 has a mental disorder. US CDC: child anxiety rose 6.9%→10.6%, depression 3.1%→4.6% (2016–22); the US Surgeon General flagged a 40% rise in adolescent hopelessness (2009–2019).
2. **Parental screen-time anxiety + spend.** 80% of US parents worry about screen time; tweens average 5h33m/day. Parents spend ~\$731/child/yr on enrichment (52% over \$1,000) — proven willingness to pay.
3. **SEL is mainstream in schools.** 83% of US principals report an SEL program; 49 states + DC have supportive policies — a validated institutional channel.
4. **Regulation pushing Big Tech away from kids.** Australia's ban, UK Online Safety Act / Children's Code (fines to £18M or 10%), EU DSA minor-protection guidelines, US KOSA effort.

The market gap / white space

Every large adjacent market is optimised for something IAM deliberately is *not*:

- **Edtech & AI-in-education chase academic outcomes** (tutoring, test prep). IAM targets positive identity, confidence and character — the emotional layer under academics that the anxiety data shows is the real pain point.
- **SEL is sold to schools as curriculum**, not to families as a beloved brand a child *wants* to engage with at home. IAM is direct-to-family and character-led.
- **Kids' wellbeing/meditation apps are generic**; kids' entertainment IP is values-neutral. IAM fuses the two: entertainment-grade IP carrying a developmental payload.
- **No competitor spans the full IP ecosystem for values** — book → course → merch → app → festival → collectibles → LLM. Pokémon proved a single kids' IP can compound to ~\$115B across exactly these formats; IAM applies that to character and confidence.
- **Personality-adaptive AI for character (not academics) is genuinely novel** — the fastest-growing adjacent segment (AI-in-K-12, 38% CAGR) is being built for grades, not growth mindset.

TAM / SAM / SOM (top-down)

~\$220B

TAM (forecast-year, est.)

~\$4.2B

SAM — AU+US+UK 6–12 families

~\$29M

SOM — near-term (~1% penetration)

TAM — global relevant markets IAM touches

SEL global (~\$27.7B by 2033) + children's book publishing (~\$24.5B) + character/entertainment licensing (~\$149.8B) + kids' mental-health/mindfulness apps (~\$20B) ≈ **~\$220B**. *Assumption: IAM only ever addresses a values/character slice of each — the outer boundary, not a claim on the whole.*

SAM — English-speaking families (AU+US+UK) with a child aged 6–12

Children 6–12: US ~24.5M + UK ~5M + AU ~2.1M ≈ **~31.6M** → ~26M target households (est.) × ~\$160 blended annual value ≈ **~\$4.2B/yr.**

SOM — obtainable near-term (3-year, est.)

At ~1.0% household penetration = 260,000 engaged families: app subscribers 150,000 → **\$18.0M**; books → **\$4.7M**; merch/collectibles → **\$6.5M** → **~\$29M/yr.** A conservative 0.3% penetration yields **~\$9M/yr** — still credible against parents' demonstrated ~\$731/child enrichment spend.

All penetration and per-family figures are labelled assumptions. This is an illustrative sizing, not a forecast.

The "why now" evidence base

The problem narrative rests on government- and court-sourced facts (framed accurately):

- **Litigation:** US state AGs seek up to ~\$1.4T in civil penalties from Meta (Aug 2026 trial — a disputed pre-trial demand, not a judgment); New Mexico \$375M verdict (Mar 2026); 42-AG suit (Oct 2023); MDL 3047.
- **Cognition:** OECD PISA 2022 maths –15 pts, reading –10 pts; US reading-for-pleasure 27%→14% (2012–2023).
- **Mental health:** US Surgeon General 2023 advisory (2× risk >3 hrs/day); CDC 57% of teen girls persistently sad/hopeless (2021).
- **Confidence:** Girlguiding — "very happy" girls 40%→17%; Australian Weet-Bix study optimism 84%→60%.
- **Policy:** Australia's under-16 ban in force; 30+ US states phone-free schools; EU DSA; UK OSA.

Cautions carried honestly into the narrative: the \$1.4T is a penalties demand, not "mental damages"; Haidt's causation claim is contested (we cite trends, not proven cause); the "47-second attention span" stat is about adults; the George Land creativity stat is unpublished and used only as a rhetorical hook. Accurate framing strengthens credibility with diligent investors.

Sources

Grand View Research, Fortune Business Insights, Mordor Intelligence, Market.us, Verified Market Research, Licensing International, Univdatos, Market Decipher, IMARC, GlobalData (market sizes); ABS, AIHW, RCH Poll (Australia); WHO, US CDC, US Surgeon General/HHS, Common Sense Media, LendingTree, CASEL (tailwinds); OECD PISA, US NEA, UK National Literacy Trust, Girlguiding, Dove (cognition/confidence); eSafety Commissioner, EU Commission, GOV.UK (policy); court filings via JURIST/CNBC/ABC (litigation); Wikipedia (Pokémon franchise). Full URL list retained in the project research files (market-gap-raw.md, problem-authority-raw.md).